Eventide®

Communications Division

Eventide *Quality Factor* Software

User Manual

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Revision History

This section summarizes significant changes, corrections, and additions to the document. The history appears in chronological order with the most recent document listed first. Documents are identified by part number and applicable software (SW) version.

This section tracks documentation changes. For a description of new software features and improvements introduced in a particular release, see the product release notes on the Eventide company website.

March 15, 2013

Part Number	SW	Description
141216–02	v2.2.0	*Eventide Quality Factor Software Option User Manual*. • Minor Updates

April 30, 2012

Part Number	SW	Description
141216–01	v2.1.0	*Eventide Quality Factor Software Option User Manual*. • Initial Release, April 30, 2012

Purpose and Applicability

This publication provides information for users of the Eventide Quality Factor software option for NexLog™ Recorders with MediaWorks Express software.

This information applies to NexLog Recorder Software 2.1.0 for the NexLog 740 and NexLog 840 recorders. It may also apply to later versions except when superseded by a more recent publication.

1. Introduction

1.1. Welcome

Welcome and congratulations on your purchase of the Eventide® Quality Factor software option for use with an Eventide NexLog™ Recorder and Eventide MediaWorks Express software.

This manual will help you maximize the use of your product. It includes:

- Explanation of what Quality Factor is and how the product implements call evaluation.
- Step-by-step instructions on how to set up and operate Eventide Quality Factor.
- How to run reports and get the most out of the data generated by Eventide Quality Factor.

1.2. Customer Support Information

Eventide is committed to your satisfaction. If, after using this manual, you still have questions about the operation of your Eventide Quality Factor software, contact your Eventide dealer or Eventide Technical Support at support@eventide.com or call (201) 641-1200.

The Eventide web site may have additional information that may be helpful. Go to www.eventide.com.

Release Numbers

You may need to identify the software version and serial number for the following products/components:

- **NexLog Recorder Software:** On the touch screen front panel or with a monitor and mouse attached (while the recorder is running), do the following to display the version information:
    - Select the menu icon on the lower left indicated by an "**e**" icon.
    - Select **Setup**.
    - Select **System**.

- Select the sub menu **System Info**.
- The Recorder Serial Number and Current Firmware Version should be displayed.

Alternatively, you can get the version and serial number remotely via the web-based NexLog Configuration Manager software:

- Navigate to the recorder's IP address (example: http://192.168.2.100), and Login. Note that the default logon credentials for the recorder (before they are changed by the administrator) are User Name: Eventide / Password: 12345.
- In the NexLog Configuration Manager's navigation menu on the left, select the **System** menu.
- In the sub navigation menu select **System Info**.
- The Recorder Serial Number and Current Firmware Version should be displayed.

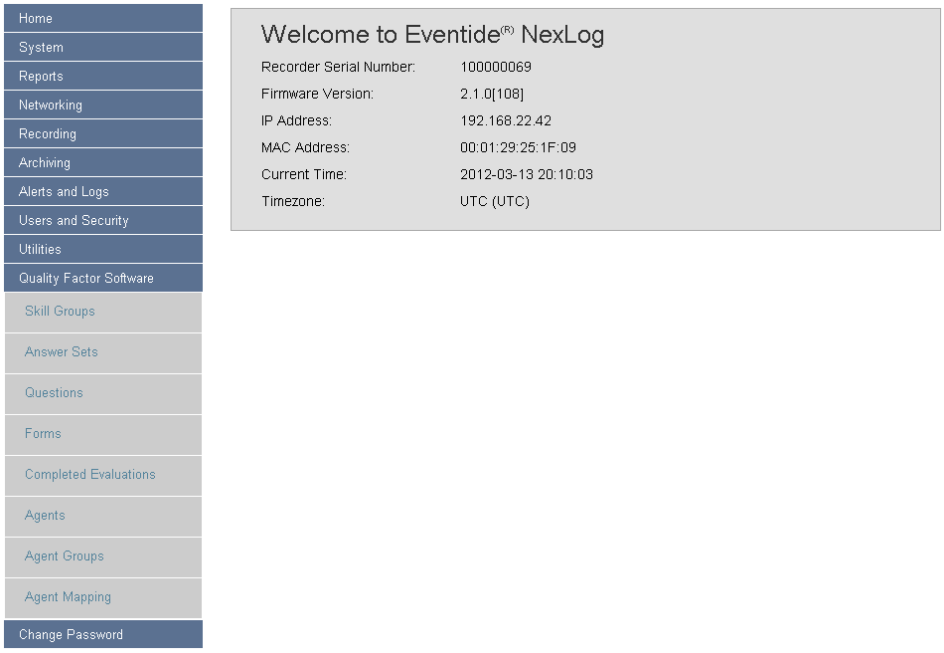
2. Quality Factor: Configuration

The Eventide Quality Factor software option provides a structured way for organizations to analyze and report on call and dispatch handling performance.

In order for Eventide Quality Factor software to work, you will need a NexLog recorder running at least NexLog software version 2.1 and an Evaluation Agents license sufficient to cover all Agents who will be evaluated. On the NexLog recorder, you will need to add a custom field for Agent_ID, of type Text. Also required is a web browser that the MediaWorks Express web client supports:

- Internet Explorer 8
- Internet Explorer 9
- Chrome
- Firefox 7 and above
- Quality Factor software is configured using the NexLog Configuration Manager in the Quality Factor Software section, as seen here:

Figure 1—Quality Factor



2.1. Quality Factor Software Workflow

Evaluation of call handling and dispatch is easy with the Eventide Quality Factor software. Once the forms and agents have been configured, it's a simple matter of selecting a call or incident in the MediaWorks Express web client, right-clicking, and then selecting an Evaluation form. A new browser tab will open with the selected Evaluation form.

Eventide Quality Factor software ships with a set of sample questions that you may find useful. You are free to adapt these to your needs and to add new questions as needed, as described in this manual.

Since most evaluation questions can be answered via a few basic types of answers, the product's Answer Sets are configured separately so that they don't have to be created each time you create a new question.

Eventide Quality Factor software ships with a default collection of Answer Sets. These are:

- Multiple choice set with the two answers:
  Yes / No
- Standard 5-step sliding scale
- Standard 10-step sliding scale
- Multiple choice set with five answers:
  Outstanding / Good / Fair / Poor / Unacceptable.

You are free to edit these Answer Sets to bring them in line with your organization's preferred terminology, and to add more Answer Sets if these don't meet your needs.

Eventide Quality Factor software requires each question to be associated with a Skill Group. Skill Groups exist to aid in the creation of forms by grouping questions together by topic or skill, and to allow evaluators and team leaders to run statistical reports by skill.

Scoring in Eventide Quality Factor software operates as follows: Each evaluation form is assigned a minimum passing score out of 100. Individual questions may be given a weighted value towards that 100. Additionally, individual questions can be flagged if the answer given results in a score below a minimum percentage. An entire Evaluation can be set to automatically fail based on the number of flags. There is also the option for a single question's failing score to cause an Autofail for the entire evaluation.

To summarize:

To evaluate a call (or a group of related calls), you choose the call(s) and then select which evaluation form to use. Each Evaluation is tagged with an Agent (each of which is pre-assigned to an Agent Group).

The Evaluation Forms are built from Questions, which in turn use Answer Sets. Each Question is assigned to a Skill Group.

Evaluation Forms can be saved in-progress and can be returned to the next time MediaWorks Express is loaded. Completed Evaluations can be viewed from MediaWorks Express or from the NexLog Configuration Manager software.

2.2. Skill Groups, Answer Sets, Questions, and Evaluation Forms

This chapter describes how to establish Skill Groups for Questions, how to create Answer Sets, how to create Questions, and finally how to create and revise the Evaluation Forms.

2.2.1 Skill Groups

Skill Groups are a way of organizing questions, both to ease in the creation of Evaluation forms, and to increase the usefulness of the evaluation results.

Before you can create new questions, you should take a look at the sample Skill Groups that ship with the Eventide Quality Factor option.

These are:

- Initial Contact
- Call Control
- Information Gathering
- Speaking Skills
- Empathy for Caller

If these groups cover your needs, you can proceed to Answer Sets and then to Questions.

Otherwise, you can add and edit the list of available skill groups by navigating to the Quality Factor Software -> Skill Groups page in the NexLog Configuration Manager web-based software. NOTE: The Questions are assigned to skill groups when created or edited via the Questions page.

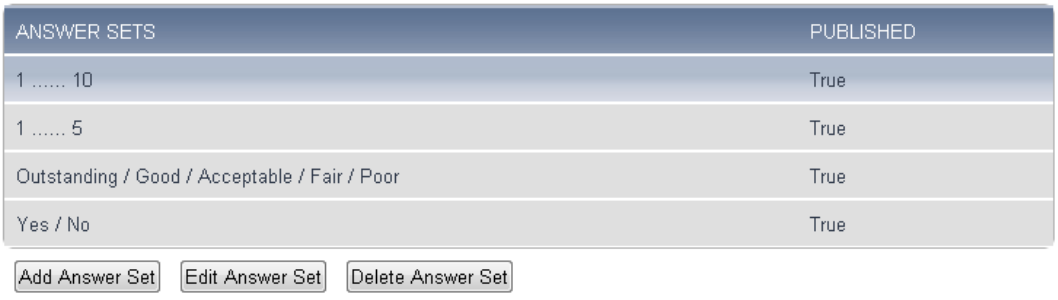
2.2.2 Answer Sets

Questions can be scored using 4 types of Answer Sets:

- Multiple Choice: A list of 2 or more answers, where the first choice is worth 100% and the last choice is worth 0%, in even increments. Examples:
    - For the default Answer Set “Yes/No”, Yes is worth 100% and No is worth 0%. (If you want No to be worth 100%, then create a new Answer Set with “No/Yes”).

- If you create a 3-choice Answer Set such as Yes/Partial/No, then Yes is worth 100%, Partial is worth 50%, and No is worth 0%. (If you want No to be worth 100%, then create a new Answer Set with "No/ Partial /Yes").
- Range 1 through 10: This type of answer set allows a Question to be scored using a sliding scale with 10 steps, where step 1 is worth 0% and step 10 is worth 100%, with equal increments for each step. You can name step 1 (such as "Poor") and you can name step 10 (such as "Excellent").
- Range 1 through 5: The same as Range 1 through 10, except this Answer Set allows a Question to be scored using a sliding scale with 5 steps, where step 1 is worth 0% and step 5 is worth 100%, with equal increments for each choice. You can name step 1 (such as "Poor") and you can name step 5 (such as "Excellent").
- Freeform: This answer set is unique in that it has no effect on how the form is scored. It is useful for questions that do not have a qualitative answer, such as "Summarize the contents of the call" or "Was there anything unusual in this call worth noting?"

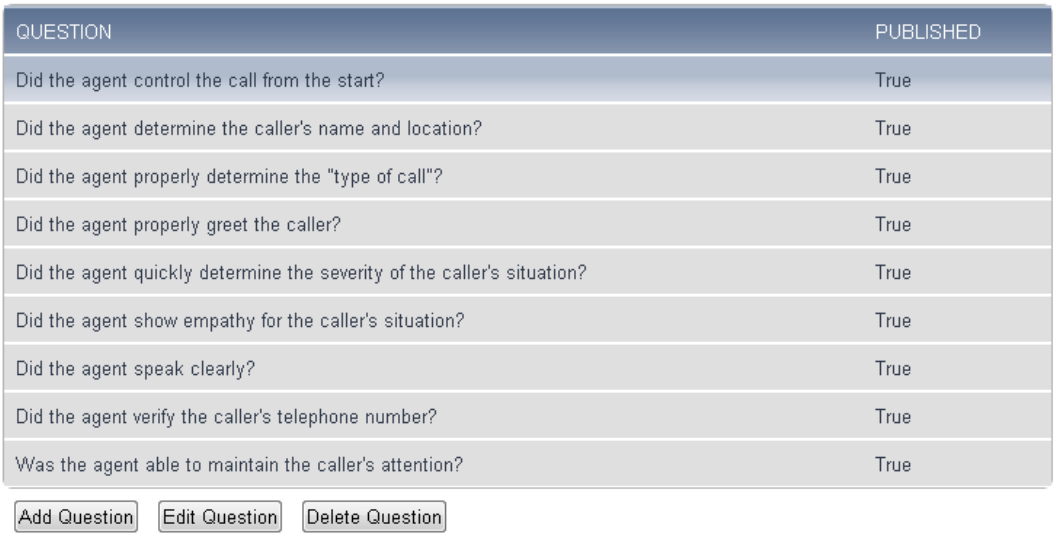
Figure 2—Answer Sets



2.2.3 Questions

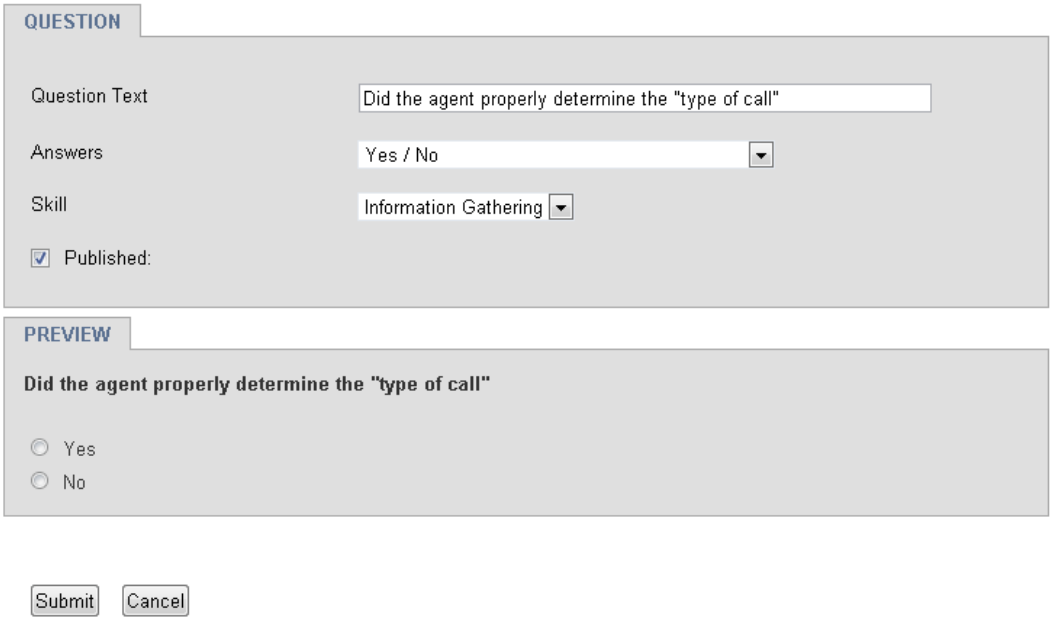
Questions are at the core of evaluation forms. Questions should be developed based on your agency's Evaluation criteria. Eventide Quality Factor software includes a set of sample Questions that will aid in understanding how questions are created, scored, and categorized into skills. You are free to customize the sample questions and add additional questions as you see fit.

Figure 3—Questions


QUESTION
PUBLISHED
Did the agent control the call from the start?
True
Did the agent determine the caller's name and location?
True
Did the agent properly determine the "type of call"?
True
Did the agent properly greet the caller?
True
Did the agent quickly determine the severity of the caller's situation?
True
Did the agent show empathy for the caller's situation?
True
Did the agent speak clearly?
True
Did the agent verify the caller's telephone number?
True
Was the agent able to maintain the caller's attention?
True
Add Question
Edit Question
Delete Question

Each Question has three options: a text field for the question itself, an Answer Set that the question is to be scored with, and the Skill Group that the Question belongs to.

Figure 4—Question Creation and Edit page



Questions can be “published,” (meaning that they are ready for use), or “unpublished,” (meaning that they are either in a rough draft form or have been retired and replaced by a newer question). Once unpublished, questions in use remain in the forms that use them, but they cannot be added to new forms.

Note that editing a question that is already in use will affect every instance of that question, including on existing forms, so editing questions should be done only to correct typos or to make minor changes in wording; no change should be made that would change the meaning of an answer that was already submitted.

If you need to make a substantial change, unpublish the original question (Edit Question -> Published checkbox) and then create a new question.

2.2.4. Forms

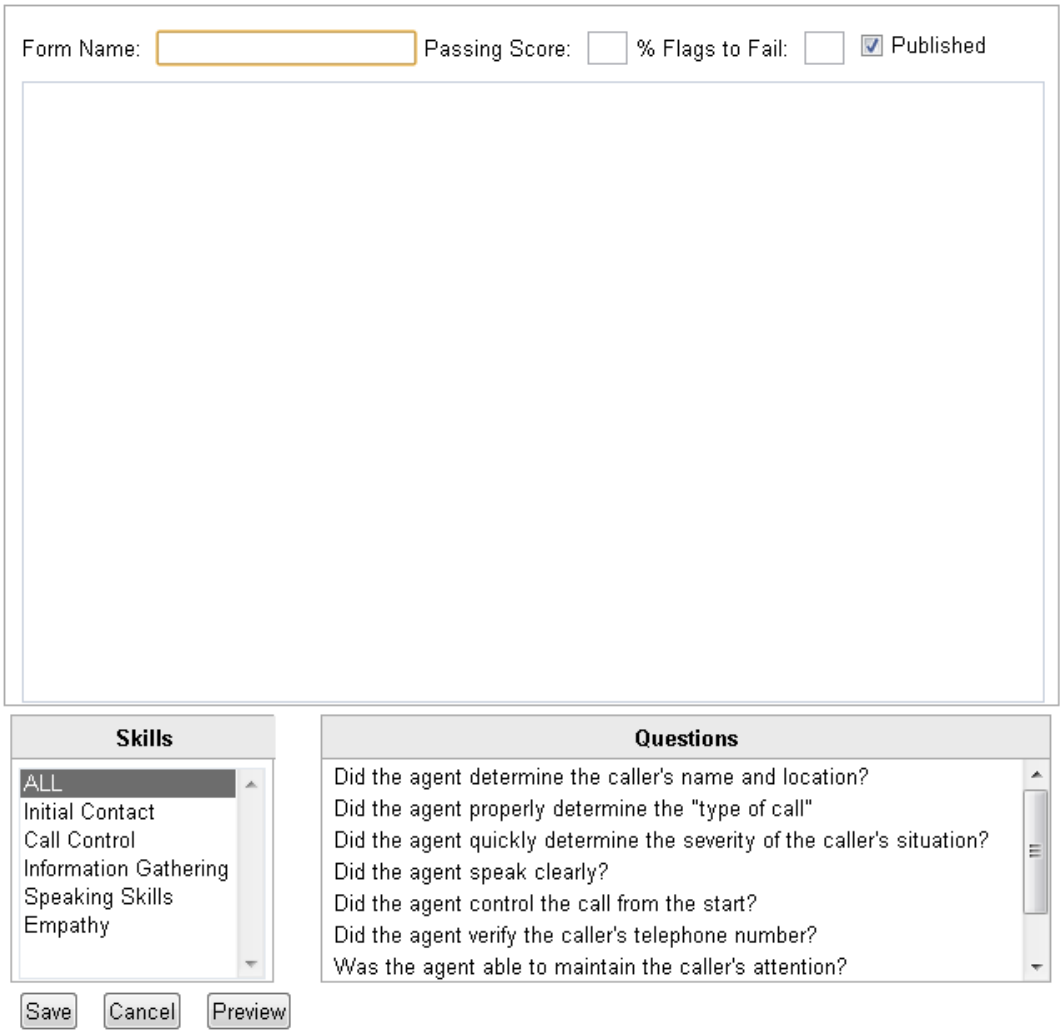
The forms page shows you a list of the Evaluation forms on the system. There is one sample form included.

Figure 5—Quality Factor: Forms page

The forms are configured by the System Administrator from the Quality Factor Software: Forms page of the NexLog Configuration Manager. The Form creation page, shown below, is organized into three separate fields:

- Evaluation Form, at top, with all evaluation questions that have been added to the form.
- Skills, at bottom-left, listing the configured skill groups to filter the questions library with.
- Questions Library, at bottom-right, with a bank of questions that have been developed for use in one or more Evaluation Forms; the list is filtered based on the selected Skill Group in the Skills field.

Figure 6—Default Form Creator

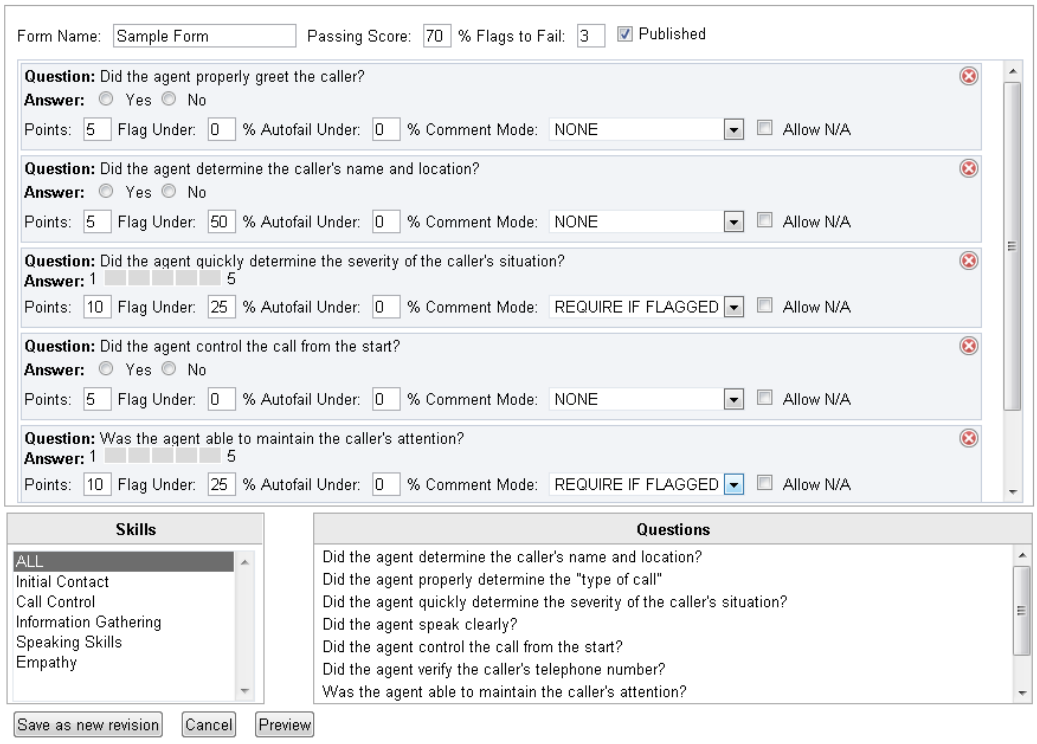


There is no limit to the number of different evaluation forms that may be created. For instance, different call handling teams or call types may have specific technical needs that should be evaluated differently, and thus may require a separate form.

Forms are created by dragging and dropping questions from the Questions field into the Form field. You can then re-order questions by dragging (up or down) and dropping, and you can delete previously added questions by clicking the red X in the upper-right corner of the question you want to delete.

The minimum score to pass and the number of flags to fail are configured at the top; more information about both topics is provided in the Evaluation Scoring section later in this chapter.

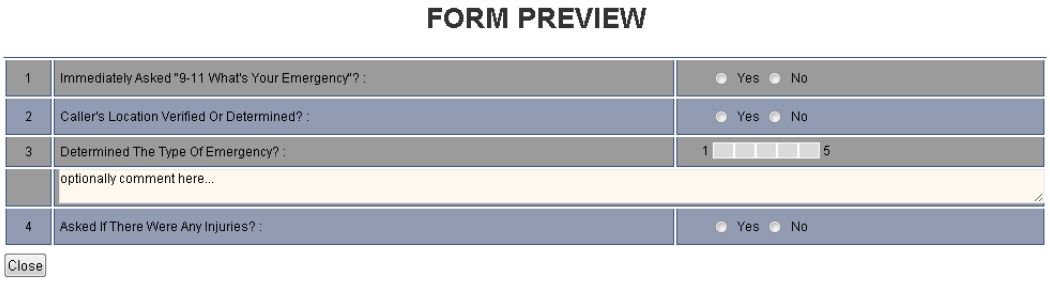
Figure 7— Form In Progress


Form Name: Sample Form
Passing Score: 70
% Flags to Fail: 3
Published
Question: Did the agent properly greet the caller?
Answer: Yes No
Points: 5 Flag Under: 0 % Autofail Under: 0 % Comment Mode: NONE Allow N/A
Question: Did the agent determine the caller's name and location?
Answer: Yes No
Points: 5 Flag Under: 50 % Autofail Under: 0 % Comment Mode: NONE Allow N/A
Question: Did the agent quickly determine the severity of the caller's situation?
Answer: 1 5
Points: 10 Flag Under: 25 % Autofail Under: 0 % Comment Mode: REQUIRE IF FLAGGED Allow N/A
Question: Did the agent control the call from the start?
Answer: Yes No
Points: 5 Flag Under: 0 % Autofail Under: 0 % Comment Mode: NONE Allow N/A
Question: Was the agent able to maintain the caller's attention?
Answer: 1 5
Points: 10 Flag Under: 25 % Autofail Under: 0 % Comment Mode: REQUIRE IF FLAGGED Allow N/A
Skills
ALL
Initial Contact
Call Control
Information Gathering
Speaking Skills
Empathy
Questions
Did the agent determine the caller's name and location?
Did the agent properly determine the "type of call"
Did the agent quickly determine the severity of the caller's situation?
Did the agent speak clearly?
Did the agent control the call from the start?
Did the agent verify the caller's telephone number?
Was the agent able to maintain the caller's attention?
Save as new revision
Cancel
Preview

Note that the evaluation form is updated in real-time; if you check the Allow N/A checkbox, as in question two in the example above, you will see the addition of a radio button for N/A. If a question has a 1-5 or 1-10 range, you can see how it will work by clicking in the range boxes yourself. These scoring settings are not saved as default answers; they are just for getting a feel for the form.

From here, you can save the form, cancel, or preview the form, which shows you how the form will look when run in MediaWorks Express:

Figure 8— Form Preview


FORM PREVIEW
1 Immediately Asked "9-11 What's Your Emergency"? : Yes No
2 Caller's Location Verified Or Determined? : Yes No
3 Determined The Type Of Emergency? : 1 5
optionally comment here...
4 Asked If There Were Any Injuries? : Yes No
Close

2.2.5. Publishing Forms and Questions

You'll notice that the creation and editing pages for Forms and Questions have a checkbox for Published. When a Form or Question is "Published," it is available for use; an unpublished form or question is either not yet ready for use, or has been retired and replaced. Unpublishing is different than deleting, because you

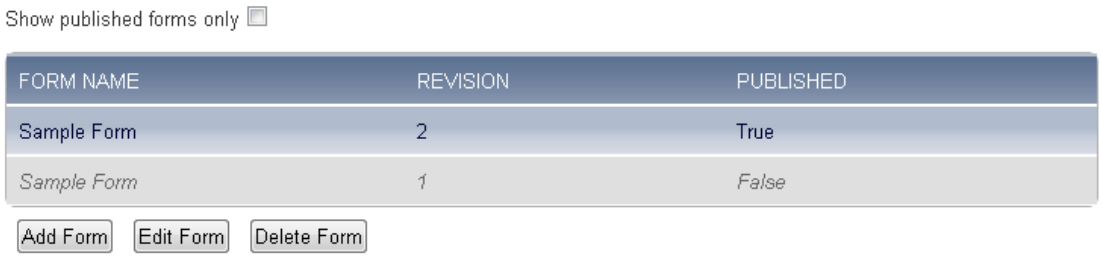
aren't allowed to delete a form or question that has been used in a completed or an in-progress evaluation, but you can prevent its use in the future.

Questions can be edited after they have been used in a completed evaluation, but this will affect every evaluation that used the question; in other words, editing a question should only be done to correct a typo or clarify its meaning in a way that would leave the correct answer the same. For major changes, unpublish the old version of the question and create a new question with the changed text or answer set. This will allow you to make use of your new version of the question on forms you create in the future (or on future revisions of your current forms), without effecting existing forms or completed evaluations.

When a form that has been used is edited, it will be saved as anew Revision, and the previous version will be automatically unpublished. The unpublished, previous versions will show up on the Form page in grey italics. The Form page has a check box to "Show published forms only," which is useful for clarity when many forms have been through several revisions.

Previous revisions remain on the logger because they are in use by previously completed evaluations.

Figure 9— Form Unpublished Because of New Revision



2.3. Evaluations Scoring

The way Evaluations are scored is straight forward but flexible enough to handle many evaluation requirements. The simplest case is a form that has a number of questions and a percentage value that needs to be met in order to pass. A form designed to meet more complex needs can have certain questions worth more points than others, can have questions that trigger an instant fail of the entire evaluation if the Agent doesn't meet expectations, and can require an Evaluator to comment on a failed question. We'll go over the basics of scoring first, and then tackle the Autofail, Flags to Fail and Commenting options.

2.3.1. Basic Scoring

Each question in a form is assigned a maximum value; this defaults to 5 points. The value of each question is relative to the other questions, so if you want a question to be worth twice as much as the others, you can set it to 10 points and leave the rest alone. Because the completed evaluation page will show the

score as a percentage out of 100, there is no need to manually manage the total number of per-question points.

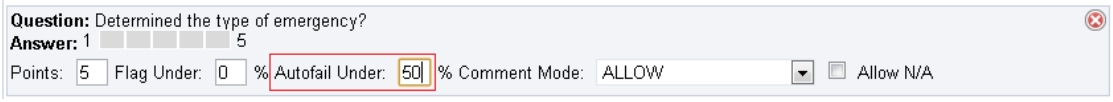
Scoring for the default Answer Sets works like this:

- **1 to 5:** A five is worth 100%, a four is worth 75%, a three is worth 50%, a two is worth 25% and a one is worth 0%.
- **1 to 10:** Rounding to the nearest ones place, a ten is worth 100%, a nine is worth 89%, an eight is worth 77%, a seven is worth 67%, a six is worth 56%, a five is worth 44%, a four is worth 33%, a three is worth 22%, a two is worth 11%, and a one is worth 0%
- **Yes / No:** Yes is worth 100% and No is worth 0%. Note that this isn't a special kind of question; it's just a two answer Multiple Choice question. If you want to use questions that need No to be the correct answer, you can create a multiple choice Answer Set called No / Yes.
- **Outstanding / Good / Fair / Poor / Unacceptable:** This is a five answer Multiple Choice question, and it scores the same as the 1 to 5 range Answer Set, with Outstanding being worth 100%, Unacceptable being worth 0% and Fair being worth 50%.
- **Freeform Answer:** Freeform answers do not affect score, as they are for non-quantitative questions that don't easily translate into numbers.

2.3.2. Autofail

Sometimes the answer to a question is important enough to be pass/fail for the entire evaluation. For example, you likely have a hardline stance against call takers using profanity when talking to callers. This is where the Autofail feature might be of use. Any question in an Evaluation form can be set to Autofail if it is scored below a certain percentage.

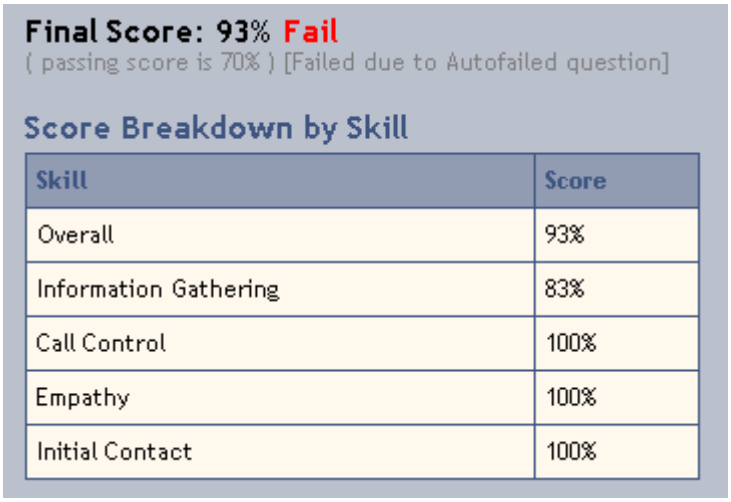
Figure 10— Question from Form Edit with Autofail Under % Highlighted



If you want a multiple choice or range-based question to Autofail only if the agent gets less than an acceptable score, you can set this value to 50% or 25% to have it fail under those values.

Note that Autofail will not preclude the rest of the questions on a form from being evaluated, so when the evaluation has been completed, you may see a percentage score alongside the failure that is greater than the minimum score needed to pass.

Figure 11—Autofailed Form with High Score

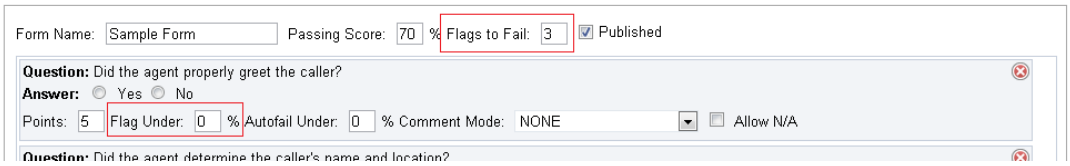


2.3.3. Flags

Another way to make scoring more sophisticated is through the use of Flags. A flagged question is one that requires attention because it was scored too low to be considered acceptable. If a form uses flags (and if Flags to Fail has been set to a number greater than 0), then an Agent receiving at least that number of flags on the form will fail the evaluation, regardless of the total score achieved.

If Flags to Fail is set to 0, then no amount of flags will fail the form, but individual questions can still be set to be flagged if you want.

Figure 12—Flags To Fail and Flag Under % Highlighted



A flag (resulting from a low score on a question) can also be configured to require the evaluator to write a comment.

2.3.4. Comments

With the exception of Free Form questions, each question on a form can have a field for comments.

There is a pull down menu on the Evaluation Form builder with four options:

- None
- Optional
- Require

- Require if flagged.

The default setting is None.

Figure 13—Comment Mode Menu in Form Builder

Form Name: Sample Form
Passing Score: 70 % Flags to Fail: 3
Published
Question: Did the agent properly greet the caller?
Answer: Yes No
Points: 5 Flag Under: 0 % Autofail Under: 0 % Comment Mode: NONE
Allow N/A

"Optional" comments provide a text-entry area for the evaluator to make a note, if something unusual catches their ear.

"Require" means that a comment will always be required and an evaluation cannot be saved as complete until the comment has been filled out.

"Require if flagged" means that a comment is required if an evaluator gives a low enough score to this question to trigger the flag,. This comment would typically explain why the question was scored so low. If you are setting up a question with the Autofail feature and want to require a comment in that case, set the Flag Under % to the same as the Autofail Under % and set the comment field to Require if Flagged.

2.3.5. Allow N/A

Each question can be configured to have a Not Applicable (N/A) answer that removes the question from scoring. A question answered N/A will not affect the total score nor the breakdown by skill group. N/A is configured per-question in the form editor and when checked, will result in an "N/A" radio button being added next to the Answer Set.

Figure 14—Flags To Fail and Flag Under % Highlighted

2.3.6. Scoring Summary

In summary, an evaluation passes if all three of the following conditions are met:

1. No questions with Autofail capability have been failed.
2. The number of flagged questions is less than the form's Flags to Fail quantity.
3. The percentage score is equal to or greater than the form's Passing Score.

An evaluation will not be able to be saved as completed if:

1. Any questions have not been answered.

2. Any questions requiring a comment are lacking a comment.
3. Any flagged questions for which a comment is 'required if flagged' lacks a comment.

3. Agents, Agent Groups, and Workstations

3.1. Agents

Agents are call takers (workers who answer/place calls) at the call center. Creating an agent entry for someone (in the logger's database) is necessary if you want to be able to evaluate their phone performance.

To avoid cluttering your logger's User list with Agents, agents do not require a proper User account unless you also wish for them to be able to use an account to log in to the recorder. They can be entered only in the Agents Page. Group Leaders, who are able to log in to the recorder to evaluate agents, do need a proper user account. Group Leaders do not need to have their own agent entry unless in addition to their group leader role they will be taking/placing calls and will themselves need to be evaluated.

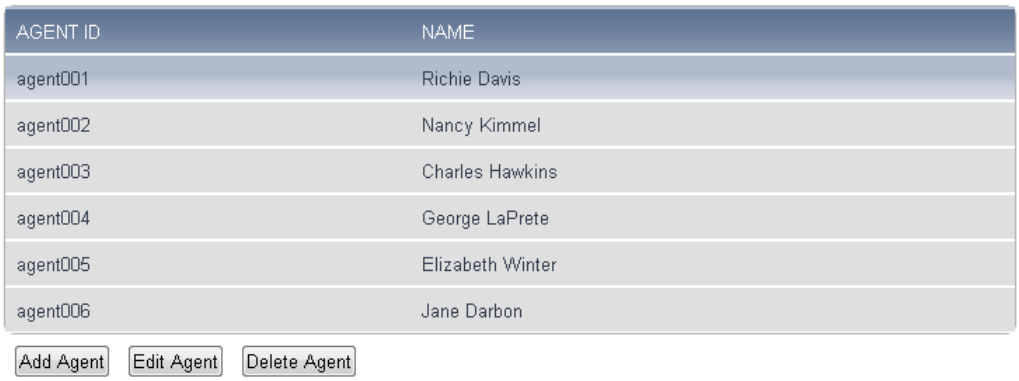
Each Agent has an Agent ID and a Name. Agents can also be associated with a User account, which can be used to allow an agent to see (and add a comment to) their own evaluations. If an Agent is expected to use MediaWorks Express or have other recorder access, they will also need a properly configured User account.

Each evaluation can be marked with an Agent and their Agent Group. To simplify this, the Workstations feature allows Agents to be automatically associated with calls based on channel number or channel name.

The maximum number of agents able to be configured on a recorder is determined by the add-on license key for Agents, which is called "Num Evaluation Agents 20x" on the System: License Keys page of the NexLog Configuration Manager. Agents are licensed in groups of 20, so a "Num Evaluation Agents 20x = 3" would mean you are licensed for 60 agents.

3.1.1. Agent Page

Figure 15— Agents

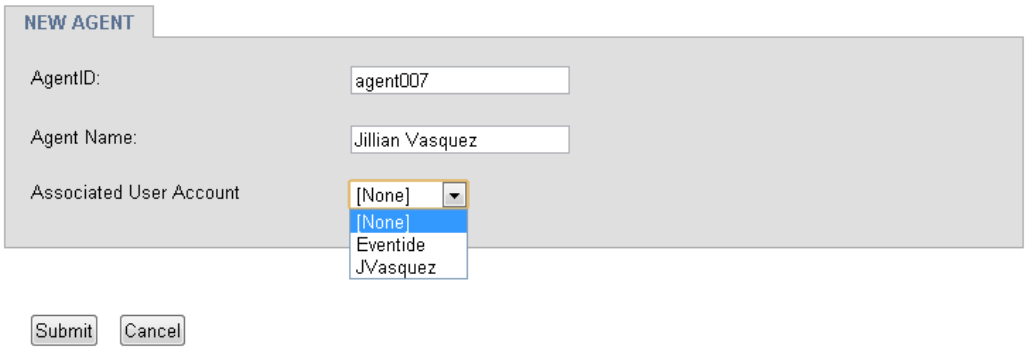


Agents are managed at the Quality Factor Software: Agents page of the Configuration Manager. Here you can add new Agents, and edit or delete existing Agents.

Special note about deleting agents: Completed evaluations for deleted agents remain on the system and you can view those evaluations by other criteria. In addition, data about deleted agents continues to be used in generating reports, for example a report on a group will include the deleted agents' scores, since they are part of the group's historical performance data. However, you will no longer be able to run a report explicitly on the deleted agent as a criterion.

3.1.2. Add Agent

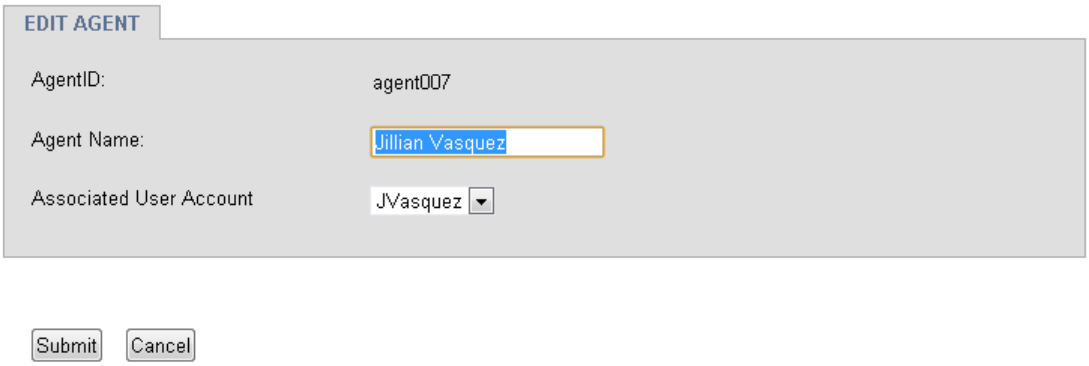
Figure 16— Add Agent



Creating new Agents is simple. You enter an Agent ID, an Agent Name, and optionally, associate the Agent with a User account existing on the Recorder.

3.1.3. Edit Agent

Figure 17— Edit Agent



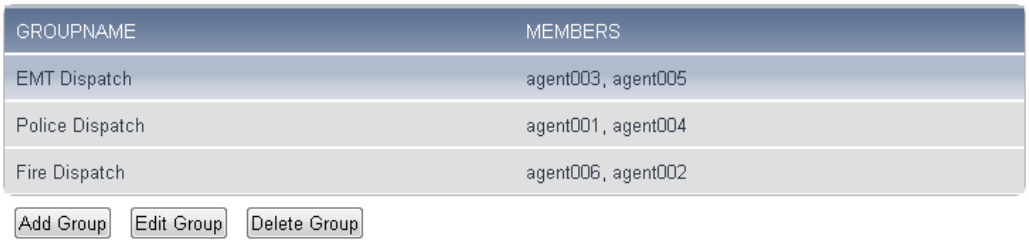
Here you are able to change the Agent Name and associated User Account of an Agent.

3.1.4. Delete Agent

This button allows you to delete an existing Agent. It will prompt you to verify you want to proceed, and then will delete the Agent from the recorder.

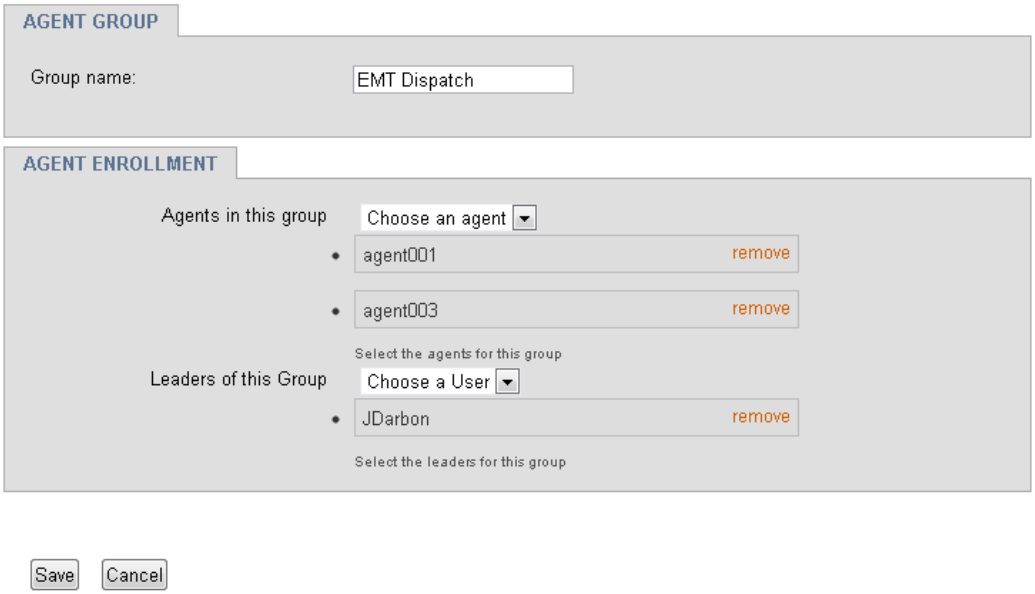
3.2. Agent Groups

Figure 18— Agent Groups



For organizations with multiple teams, Agents can be added to Groups. You can run Evaluation reports against groups to compare performance intra- and inter-groups. Groups contain agents and one or more users who is a group leader. Group Leaders are users with Admin, SuperEvaluator or Evaluator Security Groups.

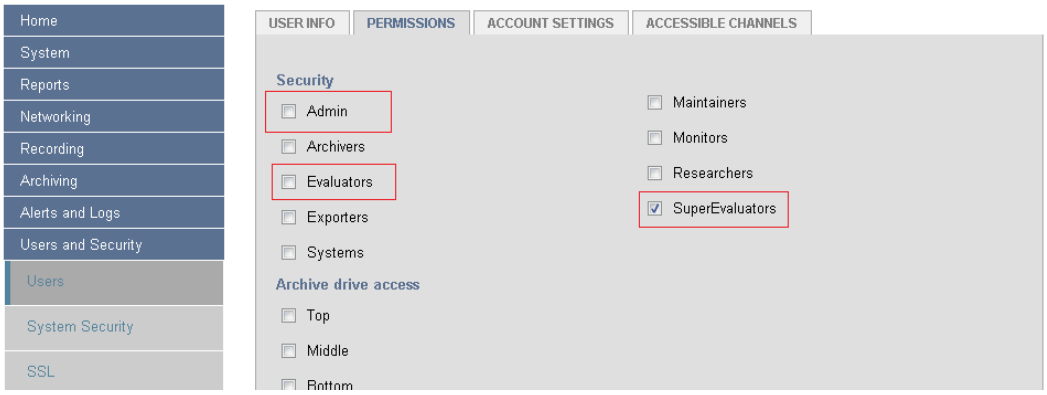
Figure 19— Agent Group Creation and Edit Page



3.2.1. Creating a Group Leader

Group leaders are users and must be created in the Users And Security: Users page of NexLog Configuration Manager. Group leaders must be part of one of three Security Groups: Admin, SuperEvaluator or Evaluator. A user in the Evaluator security group must also be a Group Leader in order to run evaluations.

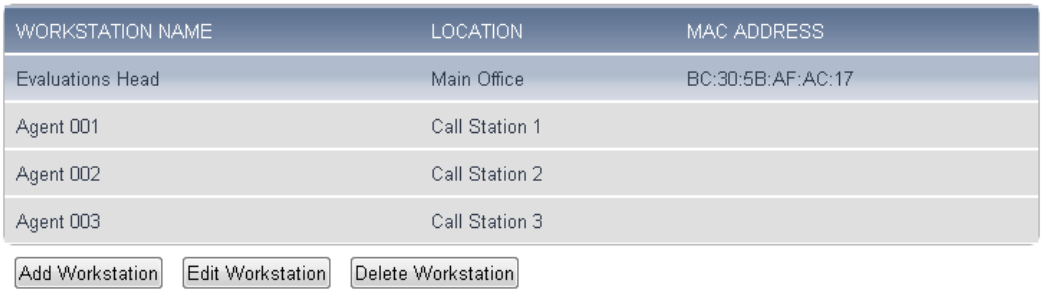
Figure 20— User Permissions tab in User Edit and Creation Pages



Once a user with Agent Group Leader permissions is created, you can assign that user to be Leader of a Group as shown in the previous section above. If the group leader is also a call taker, you can associate the group leader's user account with an agent in the agent creation or editing page, as seen in the Add Agent section above.

3.3. Agent Mapping

Figure 21— Agent Mapping



Agent Mapping allows you to tag incoming and outgoing calls on a channel number or channel name with information about the Agent or User handling the call.

With Static Mapping, all calls on a specific channel name or channel number are tagged with an Agent_ID. This is ideal for situations where an Agent has his or her own telephone that is not shared by other agents.

To use Static Agent Mapping, you must first go to Recording->Custom Fields and add a Custom Field for Agent_ID, of type Text.

With Dynamic Mapping, calls are tagged with a User_ID based on active MediaWorks (thick client) logins from Workstations identified via MAC address. If the User also has an associated Agent account, the call is also tagged with the Agent_ID. This is ideal for situations where a call taker desk is used by multiple people over the course the day and each call taker has their own user account to log into MediaWorks (thick client) with.

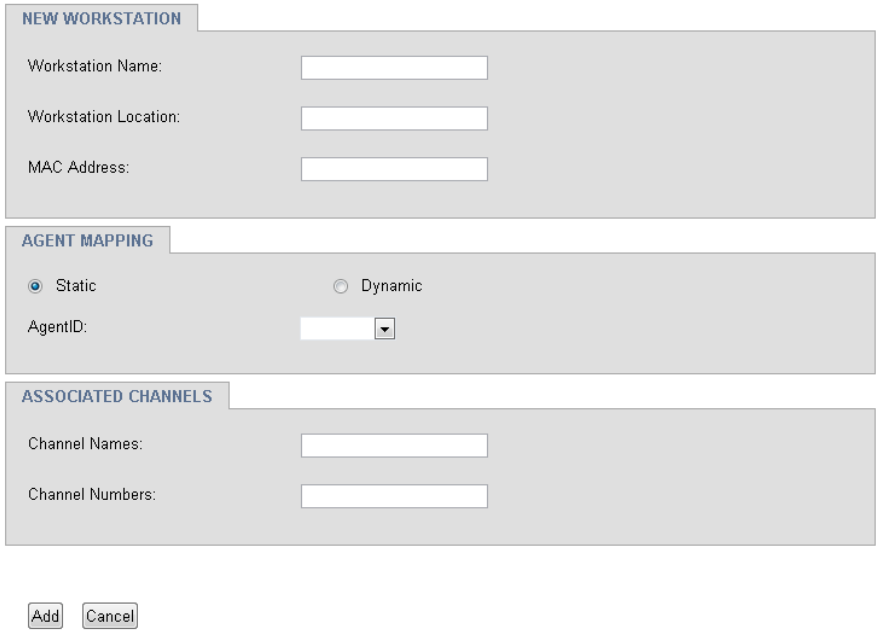
For Dynamic Agent Mapping, you must first go to Recording->Custom Fields and add Custom Fields for User_ID and Agent_ID, both of type Text.

If an Agent is associated with a User account, and calls are tagged with either method, the other field will be automatically filled out as well.

Note: In NexLog 2.0 the Agent Mapping feature was called "Workstations" and accessible in NexLog Configuration Manager via Recording -> Agent Mapping. Static Agents were not supported in NexLog 2.0

3.3.1. Adding a Workstation with Static Mapping

Figure 22— Add Workstation



The Add Workstation screen is used to assign specific channels to a workstation location and an agent (user), so that calls can be tagged with that information. When a user is logged in to MediaWorks (thick client) at a designated workstation, calls received at that location will have the user name saved in the call metadata.

Add a workstation name and location; these are for clarity sake. Entering a MAC address is recommended but not necessary as it is not used internally for a static mapping.

Click the radio button for Static, then choose the AgentID you want to map to a channel name or channel number from the AgentID pull down menu. Then enter the channel number(s) and/or channel name(s) you want mapped to that Agent.

You can create a single static map that maps the same Agent ID to multiple channels by entering channel numbers like this

- 1, 3, 5, 7-9

which would map to channels 1, 3, 5, 7, 8, and 9.

Channel names can be mapped in a comma delimited list, or with * as a wildcard, so:

- Fire 1, Fire 2

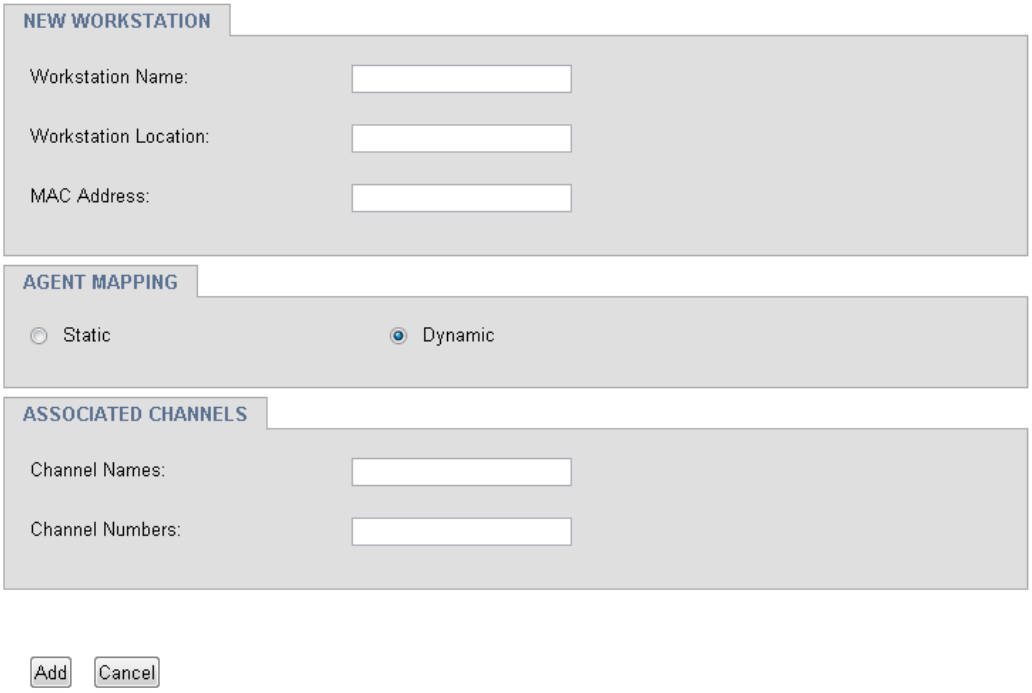
Would map to channels Fire 1 and Fire 2, and

- F*

would map to channels Fire 1, Fire 2, Forestry, and all other channels on the recorder that had channel names starting with F.

3.3.2. Add Workstation with Dynamic Mapping

Figure 23— Add Workstation



The Add Workstation screen is used to assign specific channels to a workstation location and an agent (user), so that calls can be tagged with that information. When a user is logged in to MediaWorks (thick client) at a designated workstation, calls received at that location will have the user name saved in the call metadata.

Enter the workstation name, location identifier, the channel number(s) associated with this workstation, channel name(s), and the MAC address of the workstation in the fields provided.

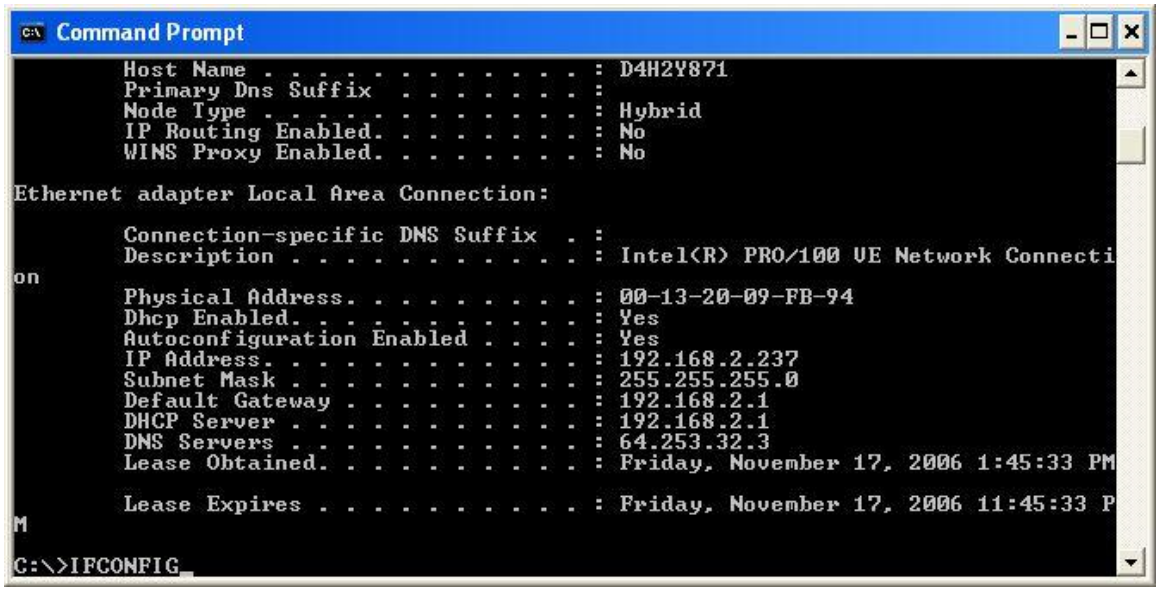
Each workstation must have a unique MAC address, which is a unique hardware identifier for the workstation's Ethernet adapter.

Do the following on the PC containing Microsoft Windows to find out the MAC address that is assigned to the PC:

1. From Programs, select **Accessories**, then **Command Prompt**.
2. When the Command Prompt screen displays, type **ipconfig /all** and press ***Enter***.

The following information displays:

Figure 24— Finding MAC Address with IPCONFIG /all


Command Prompt
Host Name . . . . . : D4H2Y871
Primary Dns Suffix . . . . . :
Node Type . . . . . : Hybrid
IP Routing Enabled. . . . . : No
WINS Proxy Enabled. . . . . : No
Ethernet adapter Local Area Connection:
Connection-specific DNS Suffix . :
Description . . . . . : Intel(R) PRO/100 VE Network Connecti
on
Physical Address. . . . . : 00-13-20-09-FB-94
Dhcp Enabled. . . . . : Yes
Autoconfiguration Enabled . . . . : Yes
IP Address. . . . . : 192.168.2.237
Subnet Mask . . . . . : 255.255.255.0
Default Gateway . . . . . : 192.168.2.1
DHCP Server . . . . . : 192.168.2.1
DNS Servers . . . . . : 64.253.32.3
Lease Obtained. . . . . : Friday, November 17, 2006 1:45:33 PM
Lease Expires . . . . . : Friday, November 17, 2006 11:45:33 P
M
C:\>IFCONFIG_

The MAC address is the Physical Address (in this example 00-13-20-FB-94).

Finally, to complete workstation setup, you must create a new metadata field called **user_id**. If a user is logged into MediaWorks (thick client) or MediaAgent on a configured workstation, then any calls recorded on the channel(s) associated with that workstation during the logged-in period are tagged with the user_id logged in.

3.3.3. Workstation Summary

In summary, a call will be tagged with Agent_ID if:

1. Static Agent Mapping is configured for calls on that channel number.
2. Static Agent Mapping is configured for calls on that channel name.
3. A User with an associated Agent account is logged into MediaWorks (thick client) at a Workstation configured for Dynamic Agent Mapping of calls on this channel name or channel number. The call will also be tagged with User_ID.

A call will be tagged with User_ID if:

1. Dynamic Agent Mapping is configured for calls on this channel name or channel number and a User with permission to access those channels is logged into MediaWorks (thick client) at the Workstation at the time of the call.
2. Static Agent Mapping is configured for calls on that channel name or channel number, for an Agent with an associated User account. The call will also be tagged with Agent_ID.

4. Evaluations

Evaluations are performed using the MediaWorks Express web client, as described in this section.

4.1. A Word about Permissions

Evaluations can only be performed by users who are logged into MediaWorks Express with a NexLog User account that is a member of the Admin, Evaluator or SuperEvaluator permission groups. Evaluators can only evaluate calls for agents in the agent groups for which they have been designated as a Leader. Evaluators who are group leaders can only view completed evaluations for their agent groups, and Evaluators who are not a group leader can only see completed evaluations about themselves.

So if User JDarbon is:

- associated with Agent id agent001
- AND is Leader of Group EMT Dispatch
- AND is in the permissions group Evaluator,

Then she can:

- Evaluate calls made by any Agent in the EMT Dispatch group.
- See completed evaluations for any Agent in the EMT Dispatch group.
- Add an Agent Comment to evaluations of calls she's taken as agent001.

Figure 25— Agent Group Edit Page

Note: Admins and SuperEvaluators can evaluate anyone, can see all completed evaluations, and can run reports for all agent groups.

Agents don't need an associated User account, but if you want them to be able to use the Agent Comment feature, they will need a User account that is part of the Evaluator user group; this will allow them to view the Completed Evaluations tab in MediaWorks Express software to see only their evaluations and allow them to add a comment. No one but the agent who was evaluated can add a comment to completed evaluations.

4.2. MediaWorks Express web client

MediaWorks Express web client can be navigated to as follows:

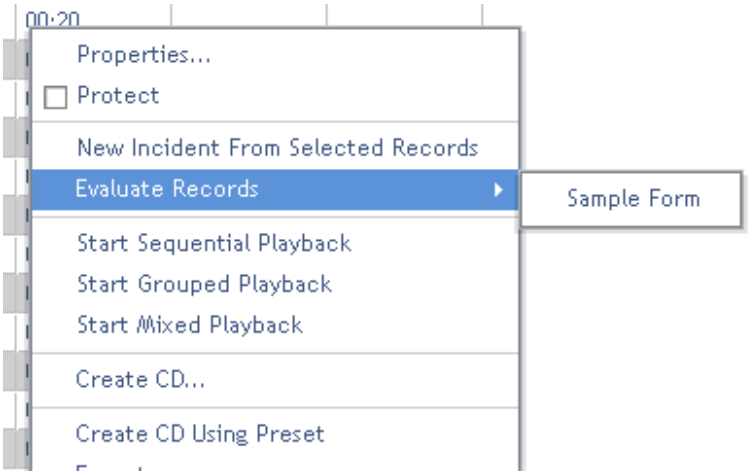
http://ipaddress.of.recorder/client/mediaworks

(where ipaddress.of.recorder is the IP address of the NexLog recorder). Consult with your network administrator if you don't know this address.

Log-on to MediaWorks Express using your NexLog user account ID and password.

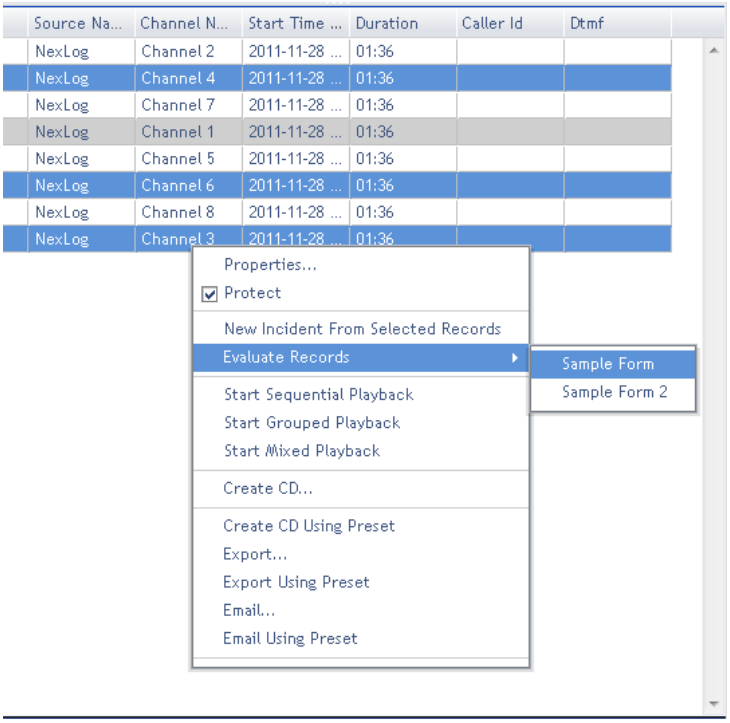
Select a call from the "Search" or "Browser" tab, right click on the call, and then select the Evaluation form that you wish to run (only published forms will be shown in this list). The Evaluation form will open in its own tab.

Figure 26— Evaluate Records Sub-menu



Sometimes a single phone call or interaction can end up as two records on the recorder. For example, an analog line set to record based on Vox Threshold may have a call broken in two because of an extended silence in the middle. In order to properly evaluate the whole call, you can select multiple records from the search or browser tabs, by ctrl+clicking additional pieces of the call, then right-click and select the form, as follows:

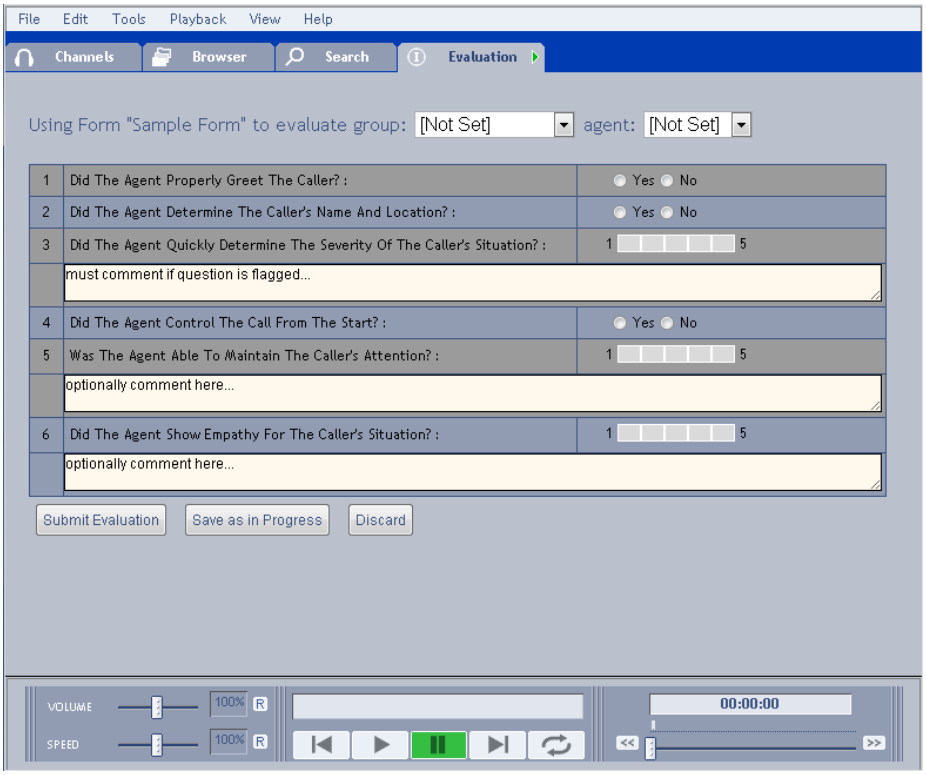
Figure 27— Evaluate Multiple Records as One



4.2.1. Evaluations

Once selected, the Evaluation form will open in its own tab:

Figure 28— Evaluation Report Form


File Edit Tools Playback View Help
Channels Browser Search Evaluation
Using Form "Sample Form" to evaluate group: [Not Set] agent: [Not Set]
1 Did The Agent Properly Greet The Caller? : Yes No
2 Did The Agent Determine The Caller's Name And Location? : Yes No
3 Did The Agent Quickly Determine The Severity Of The Caller's Situation? : 1 5
must comment if question is flagged...
4 Did The Agent Control The Call From The Start? : Yes No
5 Was The Agent Able To Maintain The Caller's Attention? : 1 5
optionally comment here...
6 Did The Agent Show Empathy For The Caller's Situation? : 1 5
optionally comment here...
Submit Evaluation
Save as in Progress
Discard
VOLUME
SPEED
100%
00:00:00

The form is largely self-explanatory.

Use the transport controls at the bottom of the page to listen to the call(s) while you are evaluating. If there is Multimedia recording in the calls, it will open in a canvas so that you can watch it and still use the evaluation form. If the Multimedia recording starts before the audio call, you can click the forward arrow to skip ahead to the time when the audio begins.

SELECT THE AGENT GROUP:

Click the Group menu to select an agent group, and then the Agent menu will only show Agents who are in that group.

SELECT THE AGENT:

If the call selected was automatically tagged with an Agent via the NexLog workstations feature, then the Agent and Group will be pre-populated with the Agent that was tagged, but you can override this manually.

Otherwise the agent will be preset as '[Not Set]' and the evaluator will need to select the agent using the dropdown menu. Do this by listening to the call and determining the agent based on the agent's voice (or use external information such as work schedules to determine which agent was at the recorded position).

EVALUATING THE CALL(S):

Use the mouse to select the answer for each question.

Enter as much text as you like into the comment boxes to explain the score or to comment about the call. If a comment is required, you will not be able to submit the evaluation until it is entered, but you can save the evaluation as “in progress”.

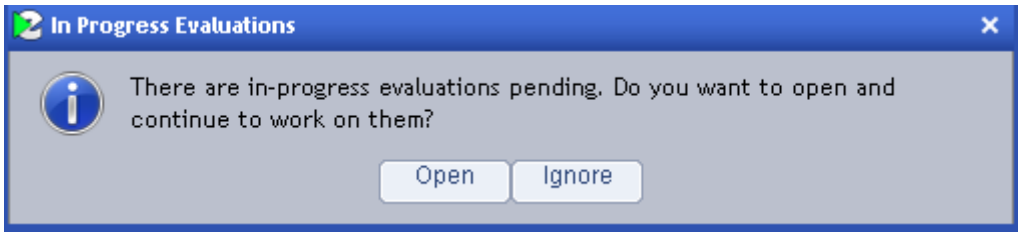
If a question is not applicable to the specific call, and if the form makes an N/A available for the question, then you can click the N/A radio button to have the question ignored for this call. (N/A buttons are optional and are configured by the form creator on a per-question basis).

4.2.2. Evaluations and Saving

Once you have completed an evaluation, you can save it as complete by clicking Submit Evaluation. If the evaluation is incomplete, an error message will pop up explaining why the evaluation cannot be saved. For example, if you overlooked a question, it will prompt you to answer that question.

Evaluations can also be saved “in progress”, with the Save As In Progress button. Clicking this will bring you to a page that says “Form saved but incomplete.” You can resume all in-progress evaluations by reloading the MediaWorks Express page; if your NexLog user account has any in-progress evaluations, you will be prompted to open them when you load MediaWorks Express. It will then open a tab for each such evaluation.

Figure 29— In Progress Evaluations Prompt


In Progress Evaluations
There are in-progress evaluations pending. Do you want to open and continue to work on them?
Open
Ignore

Once an evaluation form is submitted, you will be shown the completed evaluation page for that completed evaluation.

4.3. Completed Evaluations

Completed evaluations can be reviewed in both MediaWorks Express and the NexLog Configuration Manager. MediaWorks Express has a new kind of tab, Completed Evaluations, which can be opened from the File->New Tab menu. In the NexLog Configuration Manager, Completed Evaluations are found in the Quality Factor Software section.

Completed Evaluations can only be seen by users logged into NexLog Configuration Manager or MediaWorks Express with an account that is a member of the Admin, Evaluator or SuperEvaluator permission groups. Admins and SuperEvaluators can see completed evaluations for all agents, but Evaluators can see only those involving agents and agent groups for which they

are a designated Group Leader, or which are of the agent they are associated with.

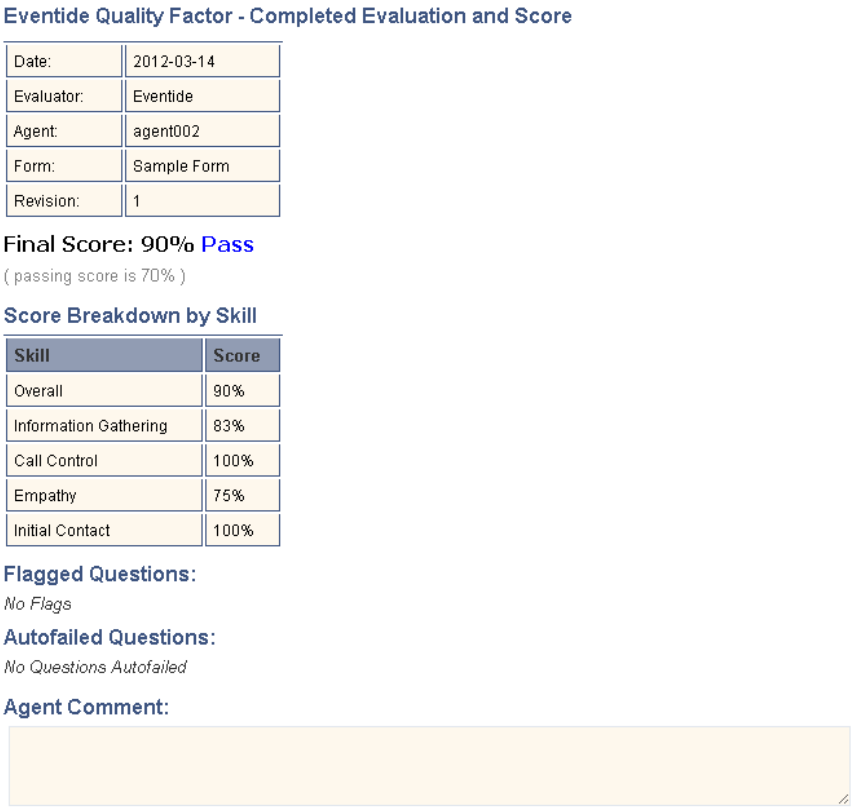
The Completed Evaluations page lists all of the completed evaluations on the logger, with a heading for Agent, Form, Evaluator, Date and Score. To view an evaluation, simply click on it to select it and then click View Evaluation and the evaluation will be displayed. In MediaWorks Express, it will open in a new tab. If you want to print an evaluation, select it from the list and click print evaluation; the selected evaluation will open in a new tab in a printer friendly format, which you can then print with your browser as you can any web page.

You can filter the list by date, agent, group, evaluator, and any by combination of these. For example, you may want to see all evaluations between September 1, 2011 and October 31, 2011, of agent agent003, by evaluator JDarbon.

Figure 30— Completed Evaluations Filter

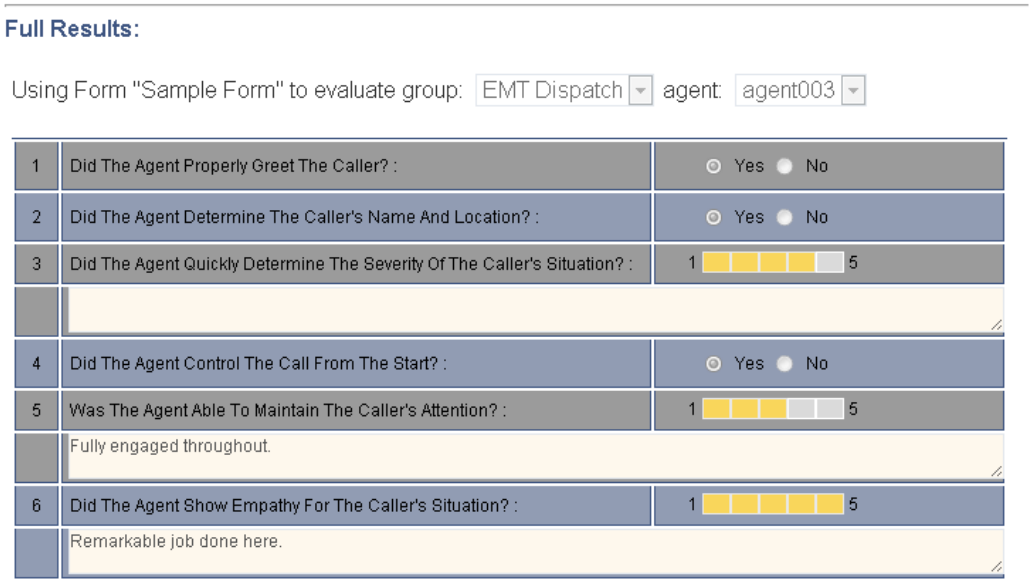
The completed evaluation page will look like this:

Figure 31— Top Half of Completed Evaluations Form



At the top, it contains a summary of the evaluation, the final score and pass/fail information, and a breakdown of the score based on skill group. It also lists any flagged questions and any autofailed questions, the comment from the Agent, which will be empty if it has not been filled out, and then it shows the full completed results.

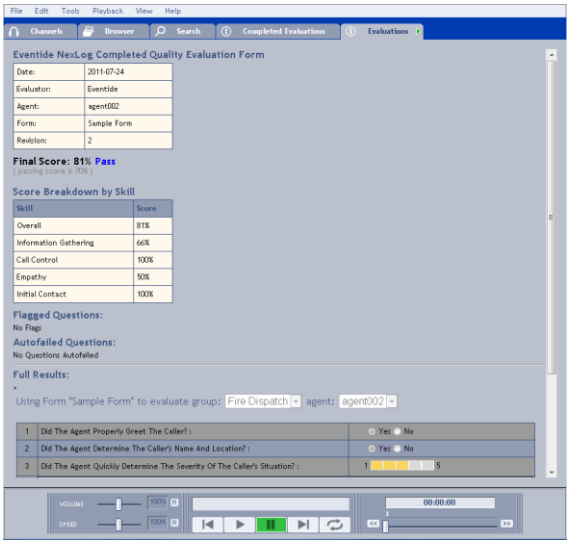
Figure 32— Bottom Half of Completed Evaluations Form


Full Results:
Using Form "Sample Form" to evaluate group: EMT Dispatch agent: agent003
1 Did The Agent Properly Greet The Caller? : Yes No
2 Did The Agent Determine The Caller's Name And Location? : Yes No
3 Did The Agent Quickly Determine The Severity Of The Caller's Situation? : 1 5
4 Did The Agent Control The Call From The Start? : Yes No
5 Was The Agent Able To Maintain The Caller's Attention? : 1 5
Fully engaged throughout.
6 Did The Agent Show Empathy For The Caller's Situation? : 1 5
Remarkable job done here.

4.3.1. The Advantage of using MediaWorks Express to review Completed Evaluations

The Completed Evaluations page differs in MediaWorks Express in one way: it has a transport control at the bottom of the page that allows you to listen to the evaluated call.

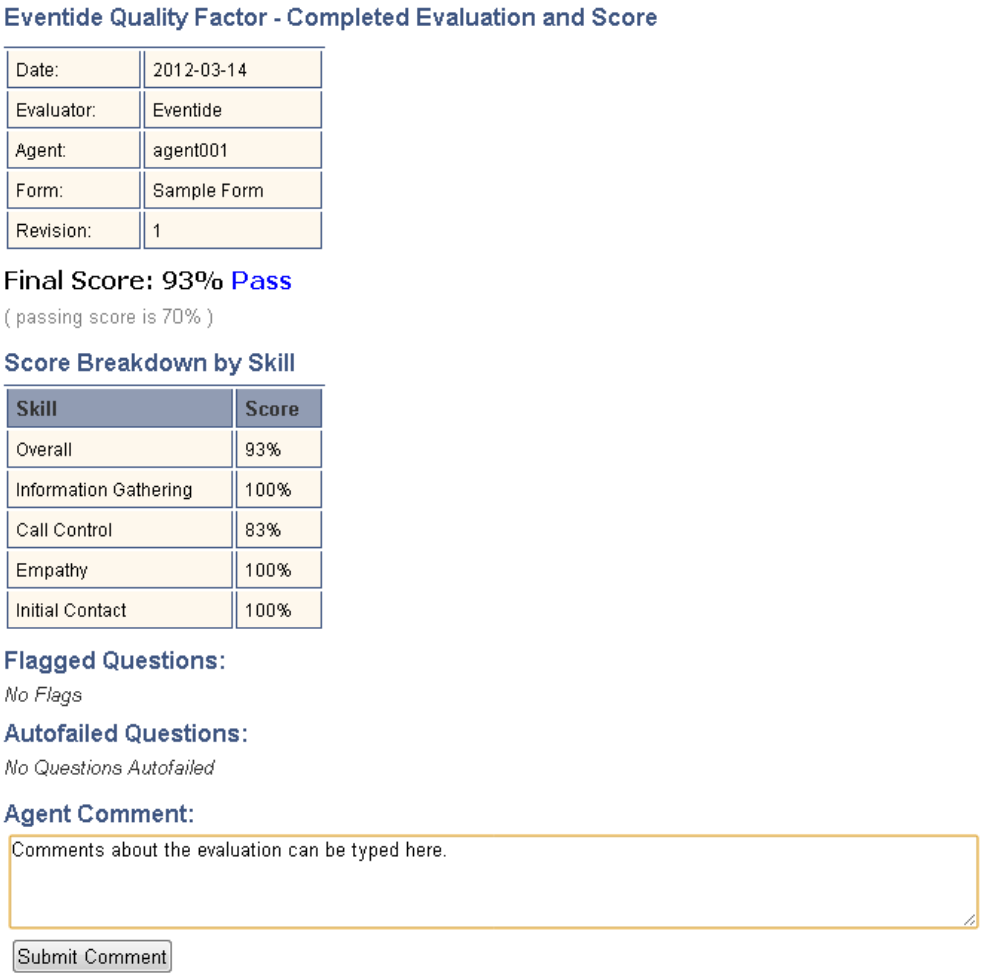
Figure 33—Completed Evaluations Form in MediaWorks Express



4.3.2. Agent Comment

The Completed Evaluations page also has a field for Agent Comment, which can only be filled out by the Agent that the Evaluation is about. The Agent in question needs to be configured such that it has an associated User account that has Evaluator, SuperEvaluator or Admin permissions.

Figure 34—Completed Evaluations Form with Agent Comment



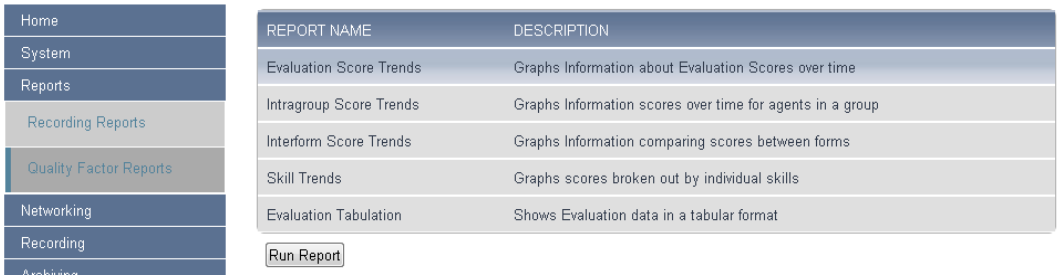
5. Reports

Quality Factor Reports allows you to analyze the performance of your agents and see trends in evaluation results over time.

5.1. Reports and Permissions

Reports can only be run by users logged into Configuration Manager with an account that is a member of the Admin, Evaluator or SuperEvaluator permission groups. Admins and SuperEvaluators can run reports for all groups; Evaluators can run reports only involving agents and agent groups for which they are a designated Group Leader.

Figure 35— Quality Factor Reports Main Page

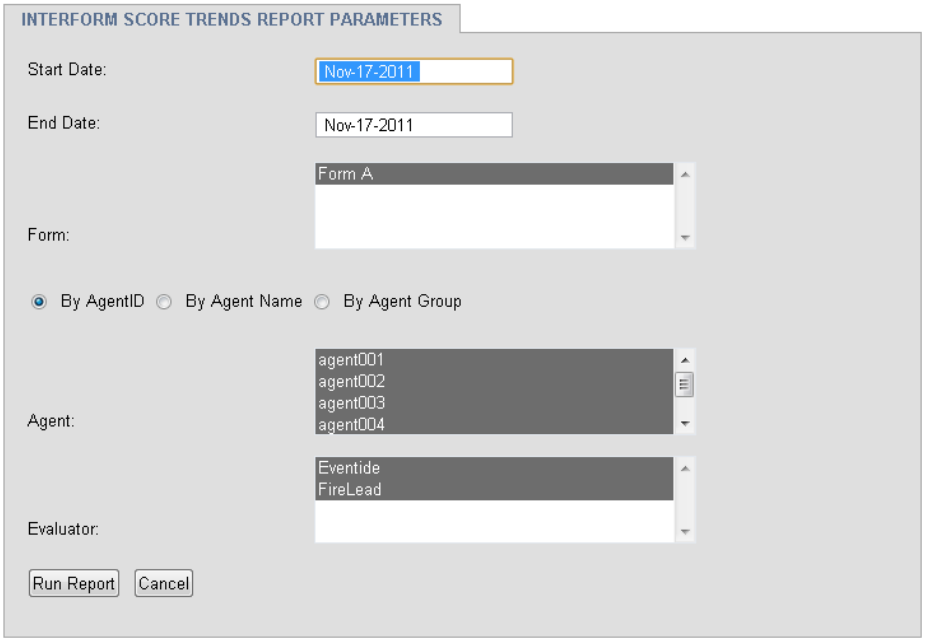


5.2. Evaluation Reports

The Eventide Quality Factor option ships with five Evaluation Reports: Evaluation Score Trends, Intragroup Score Trends, Interform Score Trends, Skill Trends, and Evaluation Tabulation.

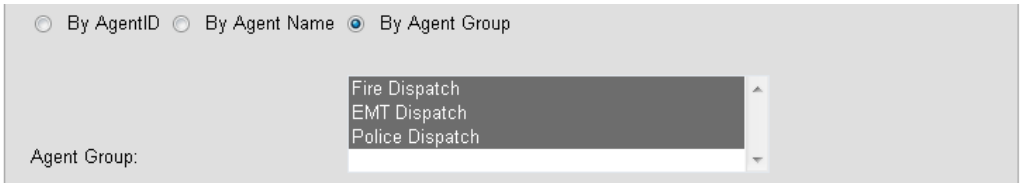
All of these reports except for Intragroup Trends are run via the following form:

Figure 36— Evaluation Report Form



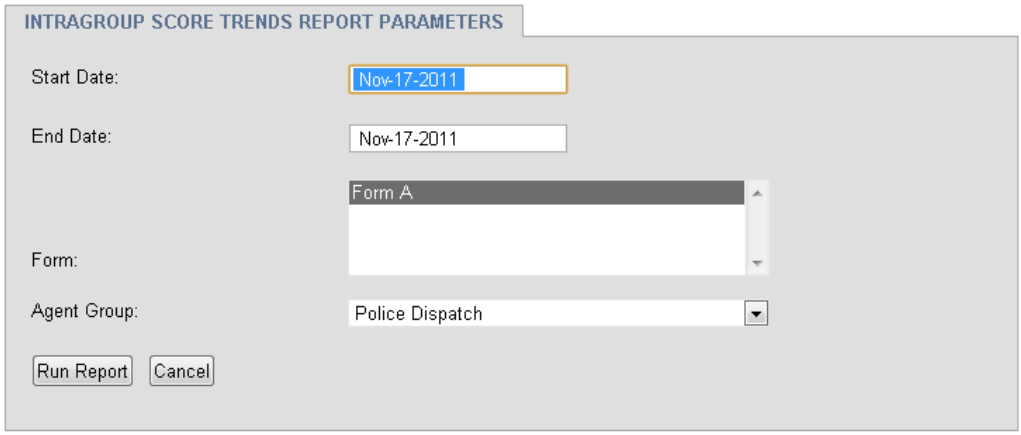
The form allows you to narrow the scope of the report based on Evaluation date, Form, Agent, and Evaluator. For Agents, you can choose based on Agent ID, Agent Name, or Agent Group, and the form will dynamically change to show the correct options, as shown below:

Figure 37— Evaluation Report By Agent Group



The Intragroup Trends report only requires that you to select a date range, Form and Agent Group, as shown below:

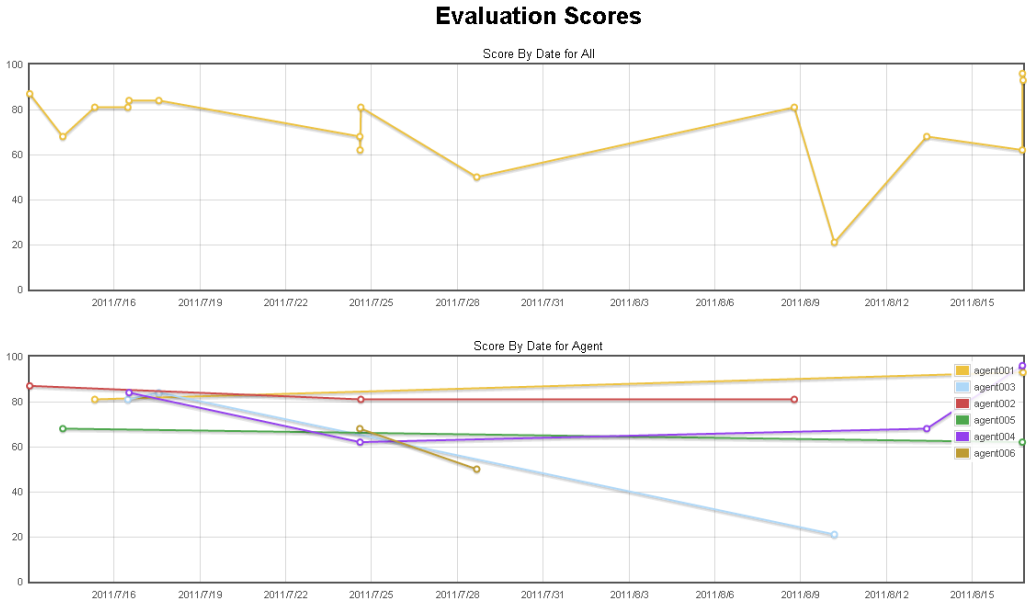
Figure 38— Intragroup Trends Report Form



5.2.1. Evaluation Score Trends Report

Evaluation Score Trends graphs Evaluation Scores over time, showing four charts: the average score by date for all, score by date per agent, score by date per evaluator, and number of flags per agent. You can filter by date, forms, agent id, agent name, agent group, and evaluator.

Figure 39— Evaluation Scores Report

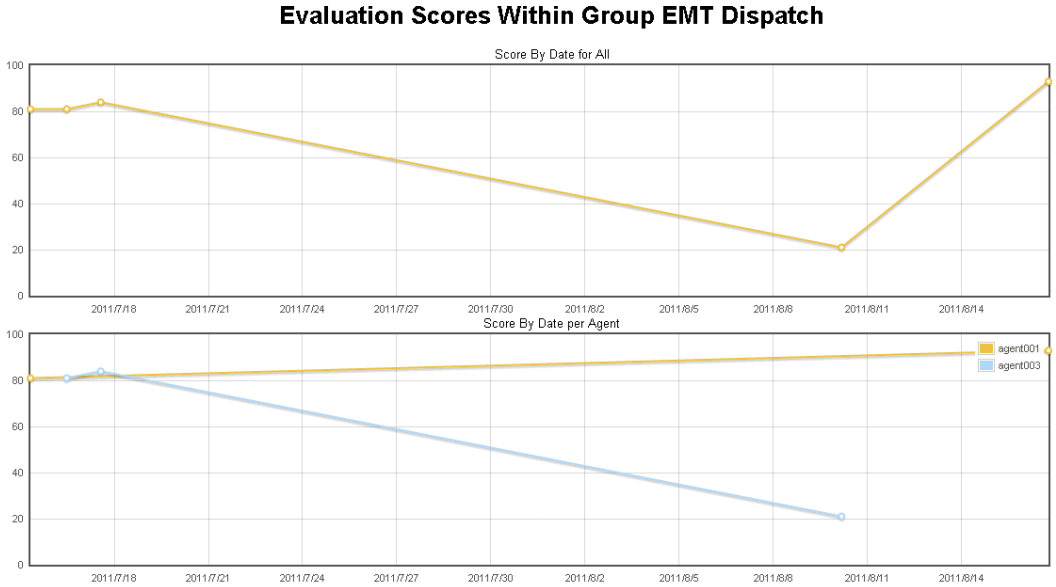


5.2.2. Intragroup Score Trends Report

The Intragroup Score Trends report graphs scores over time for agents in a single group, showing two charts: Score By Date for All, and Score By Date per Agent. With this report, you can see how a group has been performing as a unit,

and see if any individual agents are excelling or underperforming compared to the rest.

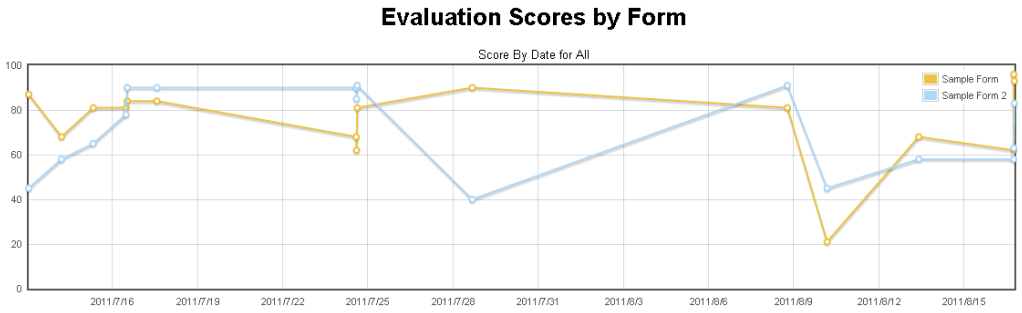
Figure 40— Intragroup Scores



5.2.3. Interform Score Trends Report

The Interform Score Trends report compares scores between forms, graphing the performance over time.

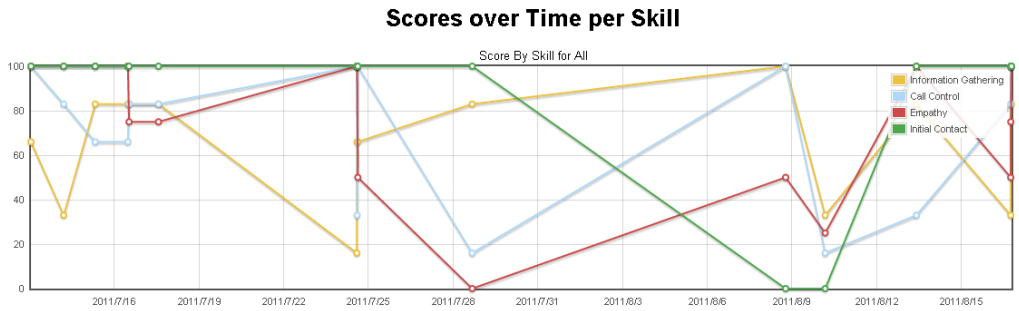
Figure 41— Interform Scores Report



5.2.4. Skill Trends Report

The Skill Trends report graphs scores broken out by individual skills, to highlight areas that are in need of improvement.

Figure 42— Skill Trends Report



5.2.5. Evaluation Tabulation

Evaluation Tabulation (Evaluation Scores Table) shows Evaluation data in a table, with Date of Evaluation, AgentID, Name, Agent Group, Evaluator, Percentage Score, Flags, and Pass/Fail.

Figure 43— Evaluation Scores Table

Score By Date

Date	AgentID	Agent Name	Agent Group	Evaluator	Percentage	Flags	Pass/Fail
2011-07-13	agent002	David Gately	Fire Dispatch	Eventide	87	0	PASS
2011-07-14	agent005	Elizabeth Winter	Fire Dispatch	Eventide	68	0	PASS
2011-07-15	agent001	Jane Darbon	EMT Dispatch	Eventide	81	0	PASS
2011-07-16	agent003	Robert Arctor	EMT Dispatch	Eventide	81	0	PASS
2011-07-16	agent004	Jillian Vasquez	Police Dispatch	Eventide	84	0	PASS
2011-07-17	agent003	Robert Arctor	EMT Dispatch	Eventide	84	0	PASS
2011-07-24	agent006	George LaPrete	Police Dispatch	Eventide	68	0	PASS
2011-07-24	agent004	Jillian Vasquez	Police Dispatch	Eventide	62	0	PASS
2011-07-24	agent002	David Gately	Fire Dispatch	Eventide	81	0	PASS
2011-07-28	agent006	George LaPrete	Police Dispatch	Eventide	90	0	PASS

Limited Warranty

The Eventide® NexLog™ Recorders are built to exacting quality standards and should give years of trouble-free service. If you are experiencing problems, your recourse is this warranty.

Eventide Inc. warrants the products unit to be free from defects in workmanship and material under normal operation and service for a period of one year from the date of purchase, as detailed in this warranty. At our discretion within the warranty period, we may elect to repair or replace the defective unit. This means that if the unit fails under normal operation because of such defect, we will repair the defective unit at no charge for parts or labor. We also assume a limited responsibility for shipping charges, as described later in this warranty.

The warranty does not extend beyond repair or replacement as stated herein and in no event will we be responsible for consequential or incidental damages caused by any defect, and such damages are specifically excluded from this warranty. Our sole obligation is to repair or replace the defective unit as described herein.

The warranty **DOES NOT COVER** any damage to the unit regardless of the cause of that damage. The unit is a complex piece of equipment that does not react well to being dropped, bounced, crushed, soaked or exposed to excessively high temperatures, voltages, electrostatic or electromagnetic fields. If the unit is damaged for these or similar causes, and the unit is deemed to be economically repairable, we will repair it and charge our normal rates.

The warranty **DOES NOT COVER** shipping damage, either to or from Eventide. If you receive a new unit from us in damaged condition, notify us and the carrier; we will arrange to file an insurance claim and either repair or exchange the unit. If you receive a new unit from a dealer in damaged condition, notify the dealer and the carrier.

If we receive the unit from you with apparent shipping damage, we will notify you and the carrier. In this case, you must arrange to collect on any insurance held by you or your carrier. We will await your instructions as to how to proceed with the unit, but we will charge you for all repairs on damaged units.

Who is covered under the warranty

The warranty applies to the original purchaser of a new unit from Eventide or an Authorized Eventide Dealer. Demo units are also covered by this warranty under slightly different circumstances (see the following information on “When the warranty becomes effective.” Units that are used, or have been used as part of a rental program, are not covered under any circumstances.

It is your responsibility to prove or to be able to prove that you have purchased the unit under circumstances which affect the warranty. A copy of your purchase invoice is normally necessary and sufficient for this.

If you have any questions about who is an Authorized Eventide Dealer, call Eventide at 201-641-1200.

Units with the serial number plate defaced or removed will not be serviced or covered by this warranty.

When the warranty becomes effective

The one-year warranty period begins on the day the unit is purchased from an Authorized Eventide Dealer or, if the unit is drop-shipped from Eventide, on the day shipped, plus a reasonable allowance for shipping delays. This applies whether or not you return your warranty registration form.

When we receive a unit, this is how we determine whether it is under warranty:

If the unit was shipped from our factory within the past calendar year, we assume that it is under warranty unless there is evidence to the contrary, such as its having been sold as used or rented, etc.

If the unit was shipped from our factory more than a calendar year ago, we assume it is not under warranty unless there is a warranty registration form on file showing that it has been purchased within the past year under appropriate conditions or if you send a copy of your purchase invoice indicating warranty status along with the unit.

If the unit was used as a demo, the warranty runs from the date that it was received by the dealer. The original purchaser gets the unexpired portion of that warranty.

When you send a unit for repair, you should indicate whether or not you believe it to be under warranty. If you do not say the unit is under warranty, we will charge you for the repair and we will not refund unless the charge was caused by an error on our part. If you believe the unit to be under warranty and you do say it is but this disagree, you will not incur any charges until the dispute is resolved.

Reading the above, you can see that it is to your advantage to send in the warranty registration form when you purchase the unit. If we know who you are,

we can send you updates and notifications, and advise you of our new products. It will also enable you to receive pre-shipment of certain parts.

Who performs warranty work

The only company authorized to perform work under this warranty is Eventide Inc., Little Ferry, New Jersey. While you are free to give personal authorization to anyone else (or to work on it yourself), we will not honor claims for payment for parts or labor from you or from third parties.

However, we and our dealers do try to be helpful in various ways. Our dealers will assist, usually without charge during the warranty period, in determining whether there is a problem requiring return to the factory, and alleviating user error or interconnection problems that may be preventing the unit from operating to its full capability.

We are available for consultation if the dealer is unable to assist.

If a part is found to be defective during the warranty period and you wish to replace it yourself, we will normally ship the part immediately at no charge, provided your warranty registration form is on file. We reserve the right to request that the defective part be returned to us.

Shipping within the 50 United States

You are responsible for getting the unit to our door at no cost to us. We cannot accept collect or COD shipments.

We will return the in-warranty unit to you prepaid, at our expense, using a standard shipping method, normally United Parcel Service. If you are in a hurry and want us to use a premium shipping method (such as air express, next day air, etc.), be sure you tell us and agree to pay shipping charges collect. If you specify a method that does not permit collect or COD charges, remit sufficient funds to prepay shipping.

Shipping outside the 50 United States

If you purchased the unit from a dealer in your country, consult with the dealer before returning the unit.

If you wish to return the unit to us, please note the following policies:

The unit must be prepaid to our door. This means that you are responsible for all shipping charges, including customs brokerage and duties. When a unit is shipped to us it must be cleared through United States Customs by an authorized broker. You must make arrangements for this to be done. Normally, your freight forwarder has a branch in the United States that can handle this transaction. If you want our assistance in clearing incoming packages, you must notify us before shipping the unit for repair, giving full

details of the shipment, and including a minimum of $250.00 in US funds to cover the administrative and brokerage expenses. Any balance will be applied to the repair charges or refunded. If a balance is due to us, we will request a further prepayment.

All shipments will be returned to you collect. If this is impossible because of shipping regulations or money is due us, we will request prepayment from you for the appropriate amount.

All funds must be in $US. Payment may be made by check drawn on any bank in the US, or by telegraphic funds transfer to our bank. If you send US currency, be sure that it is sent by a method you can trace, such as registered mail. If you wish to pay by Letter of Credit, be sure that it affords sufficient time for work to be performed and the L/C negotiated, and that it is free from restrictive conditions and documentation requirements.

We reserve the right to substitute freight carriers. Although we will attempt to honor your request for a specific carrier, it is frequently necessary to select a substitute because of difficulties in communication or scheduling.

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Version 2, June 1991

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```
one line to give the program's name and an idea of what it
does.
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```

```
along with this program; if not, write to the Free Software
Foundation, Inc., 51 Franklin Street, Fifth Floor, Boston, MA
02110-1301, USA.
```

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If the program is interactive, make it output a short notice like this when it starts in an interactive mode:

```
Gnomovision version 69, Copyright (C) year name of author
Gnomovision comes with ABSOLUTELY NO WARRANTY; for details
type `show w'. This is free software, and you are welcome
to redistribute it under certain conditions; type `show c'
for details.
```

The hypothetical commands `` `show w' `` and `` `show c' `` should show the appropriate parts of the General Public License. Of course, the commands you use may be called something other than `` `show w' `` and `` `show c' ``; they could even be mouse-clicks or menu items--whatever suits your program.

You should also get your employer (if you work as a programmer) or your school, if any, to sign a "copyright disclaimer" for the program, if necessary. Here is a sample; alter the names:

```
Yoyodyne, Inc., hereby disclaims all copyright
interest in the program `Gnomovision'
(which makes passes at compilers) written
by James Hacker.

signature of Ty Coon, 1 April 1989
Ty Coon, President of Vice
```

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Eventide, Inc.

ATTN: NexLog Engineering – GPL Software Request

1 Alsan Way

Little Ferry, NJ 08731

USA

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- A Self Addressed Padded Return Envelope with sufficient space and postage for your media to be returned to you with the requested data.
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